Newspapers' TV Logs Bid for National Ads

October 1988

presstime

The Journal of the American Newspaper Publishers Association

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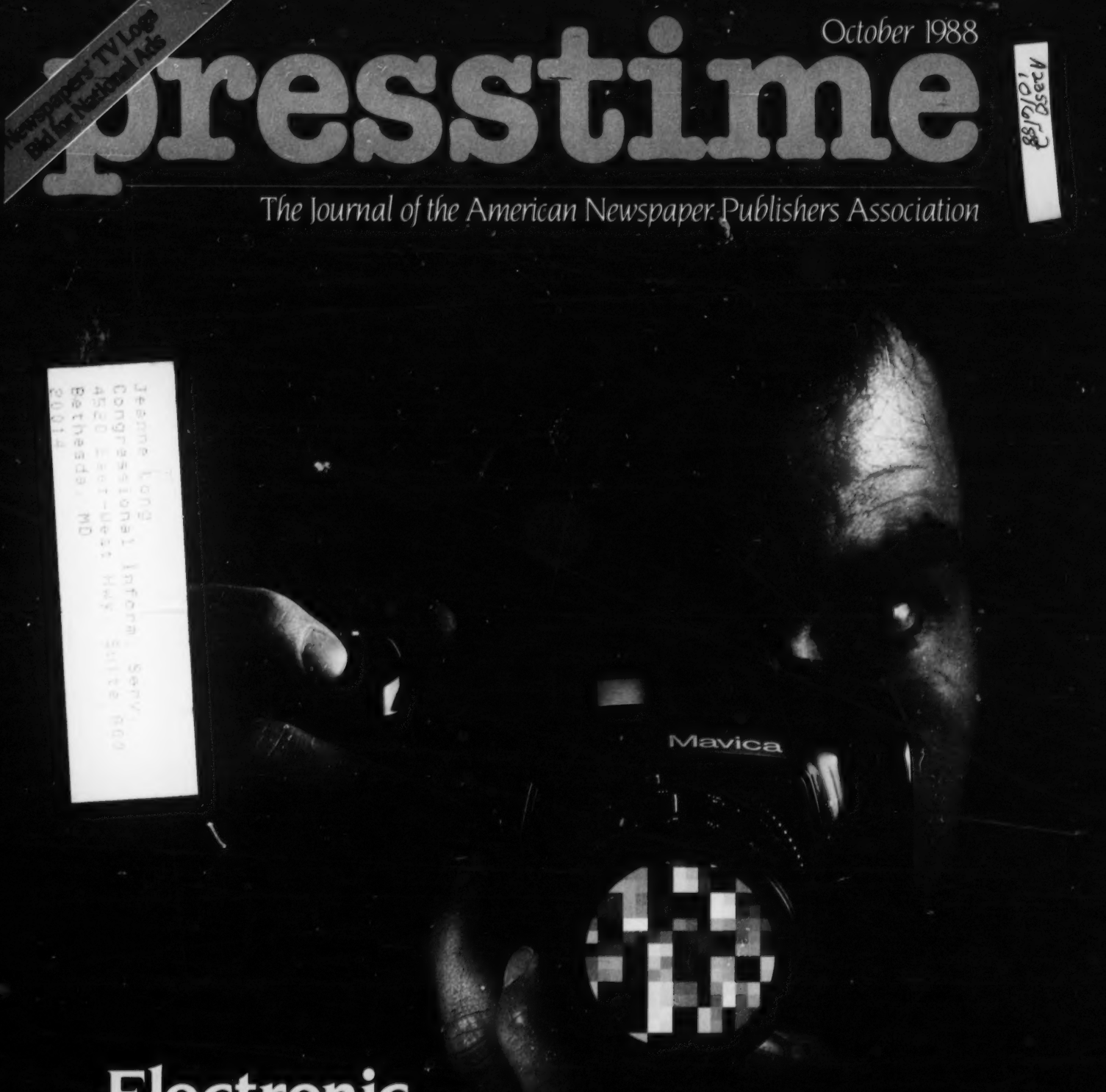

Electronic Photography Coming of Age

presstime

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Special Report *An "electronic freeway" is being built to speed pictures from news events to newspaper pages more directly than ever before. Photographers and picture editors are making the transition from film to floppy disk, from chemicals to computers. The new technology for taking and processing digitized photographs still has a way to go, and, so far, it has been used only occasionally. But electronic photography promises such savings in time and money that many newspaper professionals look forward to making it the centerpiece of their picture-handling systems.* **30**

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Computerized ad-taking *Recently adopted standards for "remote entry" of classified ads could make the practice accessible to many more papers.* **62**

ANPA membership survey *Circulation and readership top the list of ANPA members' concerns, as they did 10 years ago.* **86**

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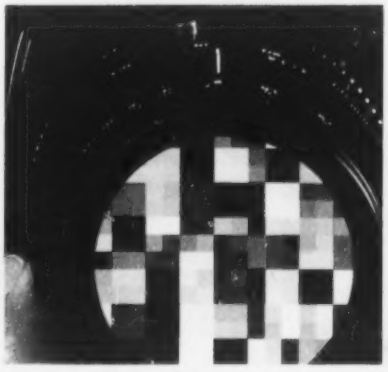

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CHAIRMAN'S CORNER

We need to apply the brakes to the newsprint roller coaster

Few things are more calculated to drive publishers to drink than trying to forecast the price and availability of newsprint. Even a careful study of the quality and quantity of *hors d'oeuvres* served by newsprint manufacturers at the annual rounds of parties during ANPA Convention Week yields no clue to the future. Papermaking, it would seem, is a boom-or-bust business—a roller-coaster ride for manufacturer and customer alike.

The moment that one mentions words such as "supply" or "price" the noses of many lawyers start to twitch. As I have no particular desire to conclude my term as your chairman behind bars, I shall be circumspect. But look at some of the facts.

Arthur Ochs Sulzberger

For most metropolitan newspapers, newsprint costs represent as much as 23 percent of operating expenses. For smaller newspapers, it is a smaller percentage, but, on the other hand, smaller newspapers generally do not have the purchasing clout to cut special discount deals. Nor do many smaller newspapers have the necessary tonnage requirements that would permit them to enter into manufacturing arrangements with traditional papermakers as The New York Times Co. and Knight-Ridder Inc. have done.

But all of us, large and small, are caught in a clutch of a terribly cyclical business. As I noted before, it's a roller-coaster ride, moving from shortages that send publishers bidding for remote production of inferior newsprint at one moment, to great globs of newsprint overhanging the market just a few short years later.

And the price of the commodity, which is what it is, tracks behind in a most consistent way. Then, what happens? One moment, with tons of paper around, we negotiate tough deals with the manufacturers. The next moment there are shortages, and the manufacturers hand it back to us. Up and down, up and down—and no one can plan for the future.

ANPA has an excellent Newsprint Committee, formed in 1976, to monitor newsprint developments and to establish priorities and programs with respect to supply, transportation, quality and research. Perhaps now is the time to ask committee members to broaden their mandate to see if they can find an effective way to curb the extreme cyclicality that plagues the manufacturing and purchase of our primary raw material. It is a tough challenge, but progress on it could bring stability to our industry.

Arthur Ochs Sulzberger
ANPA Chairman

ANPA

presstime

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Consumption continues downward trend

Newsprint consumption by U.S. daily newspapers decreased 4.7 percent in August compared with August 1987. It was the fifth straight month of declining consumption. (Revised figures showed that June was a down month, not a month of increased consumption as reported preliminarily [presstime, Sept. 1988, p. 71].)

However for the first eight months of the year, there was a 0.3-percent increase in U.S. dailies' consumption.

Consumption by all U.S. users also dropped in August, by 4.5 percent from August 1987. For the eight-month period, though, there was a slight increase of 0.9 percent.

Newsprint inventories of newspapers in ANPA's statistical sample averaged a 47-day supply in August, up from 43 days a year earlier.

Estimated consumption of all U.S. daily newspapers[1]

Region	June 1988(r)	June 1987	% Change
Northeast	194,418	197,347	-1.5
North Central	162,380	158,474	+2.5
South	223,069	224,446	-0.6
West	171,495	172,377	-0.5
Circulation Size			
up to 25,000	57,977	58,939	-1.6
25,001-100,000	160,932	161,306	-0.2
Over 100,000	532,453	532,399	+0.1
June totals	751,362	752,644	-0.2
Region	**July 1988**	**July 1987**	**% Change**
Northeast	179,242	180,902	-0.9
North Central	152,868	155,896	-1.9
South	226,452	222,644	+1.7
West	166,699	166,571	+0.1
Circulation Size			
up to 25,000	55,461	59,167	-6.3
25,001-100,000	159,576	157,144	+1.5
Over 100,000	510,224	509,704	+0.1
July totals	725,261	726,013	-0.1
Region	**August 1988(p)**	**August 1987**	**% Change**
Northeast	181,088	196,589	-7.9
North Central	157,819	164,020	-3.8
South	230,751	237,176	-2.7
West	165,820	173,634	-4.5
Circulation Size			
up to 25,000	55,991	60,290	-7.1
25,001-100,000	162,029	162,384	-0.2
Over 100,000	517,458	548,745	-5.7
August totals	735,478	771,419	-4.7
Eight-month totals	6,061,823	6,044,760	+0.3

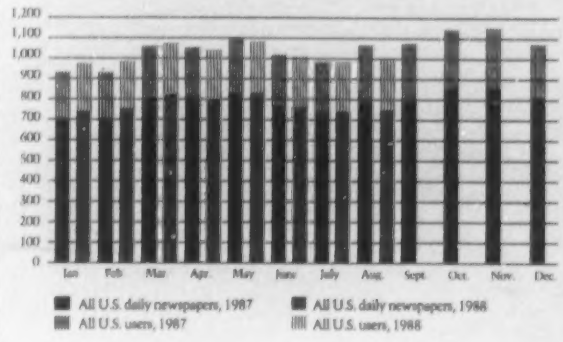
Estimated consumption of all U.S. users

	1988	1987	% Change
June totals	997,085(r)	996,426	+0.08(r)
July totals	973,632	967,075	+0.7
August totals	994,347(p)	1,040,896	-4.5(p)
Eight-month totals	8,027,718(p)	7,959,194	+0.9(p)

Production

	Canada	U.S.A.	North America
July 1988	826,805	435,891	1,262,696
July 1987	791,424	454,979	1,246,403
Increase or decrease	+35,381 +4.5%	-19,088 -4.2%	+16,293 +1.3%
August 1988	845,882	461,402	1,307,284
August 1987	825,657	452,045	1,277,702
Increase	+20,225 +2.4%	+9,357 +2.1%	+29,582 +2.3%
Eight months 1988	6,668,142	3,608,320	10,276,462
Eight months 1987	6,454,089	3,500,161	9,954,250
Increase	+214,053 +3.3%	+108,159 +3.1%	+322,212 +3.2%

Estimated newsprint consumption, 1987-1988 (thousands of metric tons)



Stocks

U.S. publishers[2]	Tonnage	Days' supply On hand	Days' supply In transit
June 1988	989,453	45(r)	7
June 1987	885,171	40	7
July 1988	972,566	45	6
July 1987	931,330	39	6
August 1988	987,074	42(p)	5(p)
August 1987	904,565	37	6
Canadian mills			
July 1988	343,181		
July 1987	285,590		
August 1988	341,707		
August 1987	326,114		
U.S. mills			
July 1988	64,543		
July 1987	42,930		
August 1988	67,138		
August 1987	45,591		

Shipments

From Canadian mills	U.S.A.	Canada	Export	Total
July 1988	573,690	99,182	121,344	794,216
July 1987	575,852	87,537	115,380	778,769
August 1988	602,952	98,174	146,230	847,356
August 1987	567,536	94,938	122,659	785,133
Eight months 1988	4,695,989	805,887	1,013,654	6,515,530
Eight months 1987	4,642,120	755,089	1,007,970	6,405,179
Increase	+53,869 +1.2%	+50,798 +6.7%	+5,684 +0.6%	+110,351 +1.7%
From U.S. mills				
July 1988	390,443		40,274	430,717
July 1987	427,573		24,321	451,894
August 1988	423,615		35,192	458,807
August 1987	428,782		20,602	449,384
Eight months 1988	3,350,091		227,222	3,577,313
Eight months 1987	3,300,728		202,916	3,503,644
Increase	+49,363 +1.5%		+24,306 +12.0%	+73,669 +2.1%
From North American mills				
Eight months 1987	8,046,080	805,887	1,240,876	10,092,843
Eight months 1986	7,942,848	755,089	1,210,886	9,908,823
Increase	+103,232 +1.3%	+50,798 +6.7%	+29,990 +2.5%	+184,020 +1.9%

[1]Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2]Represents stocks of newspapers in ANPA statistical sample.
(r) = revised (p) = preliminary

Members again say circulation/readership should be top ANPA priority

Circulation/readership issues once again have topped the list of priorities that ANPA members think the Association should adopt. The finding, part of a new membership survey completed in September, parallels concerns expressed in the last membership poll conducted a decade ago.

ANPA Chairman Arthur Ochs Sulzberger said the Association responded immediately to the 1988 results. "Both in this year's operations and in our planning for 1989, we are placing increased emphasis and resources on priority areas identified in the survey—circulation, literacy, editorial excellence and government relations," said Sulzberger, chairman of The New York Times Co. and publisher of The New York Times.

The survey also showed members generally are pleased with the Association and its activities, and believe it is becoming even more effective.

Respondents expressed little negative criticism; only 2 percent said ANPA has become "less effective" in its service to the newspaper business. Of those, the largest portion, 14 percent, said the Association should take more of an interest in small newspapers.

Respondents split on the question of whether ANPA should serve mainly as a "clearinghouse" to collect and disseminate industry information, or take a "leadership" role to "enhance the work of all newspaper organizations and newspapers."

There was clear consensus, however, that the thrust of ANPA's work should be directed at long-term objectives, even if that means devoting less attention to short-term concerns.

The new survey was conducted by the Gallup Organization of Princeton, N.J., which mailed questionnaires to 5,220 personnel of ANPA-member newspapers. The response rate was 44 percent.

ANPA Secretary Lloyd G. Schermer, chairman of the Membership Survey Task Force, said this year's poll was more comprehensive and drew wider member participation than the one in 1978. "Perhaps most important," said Schermer, chairman and chief executive officer of Lee Enterprises Inc., "was the breakout of the views of executives from all the key departments of our newspapers, each of whom needs and uses ANPA for different things."

ANPA President Jerry W. Friedheim said that while the Association is responding immediately to the priority concerns identified by respondents, it is "not curtailing any other vital services, such as production, human resources, **presstime**, meetings or training."

He pointed out that after ANPA members in the 1978 survey expressed the desire for better communications, the Association started **presstime**. "We will respond similarly this time to what's most important to the business."

Participants were classified five ways: "top management executives," including publishers, chief executive officers and general managers; editors; advertising and circulation executives; human resources executives; and production executives.

Because of the way the survey was structured, the precise number of newspapers whose executives responded could not be tabulated. However, Gallup says it is "reasonable to conclude that well over half of the member newspapers are represented."

In this year's study, the majority of executives—especially in "top management"—said ANPA has been "more effective" in its work over the last five years. The biggest reasons given were ANPA's "broadened scope"; publication of **presstime**, considered the "major point of contact with ANPA across all management types"; the belief that the Association "keeps up with current situations"; and the belief that it has "better communication" with the membership.

The survey also showed that most respondents believe ANPA represents their legislative and public-policy interests effectively.

Among responses to tailored questionnaires prepared for different executive classifications were these:

- **Top management.** "Circulation/readership" was the group's top priority, followed by "reading skills/literacy," competition from other print media for advertising and circulation, editorial quality, and operating costs. Minority opportunity, an area of recent newspaper-industry emphasis, was 14th among 18 rankings. Last was "international press freedom."

Of 26 ANPA services listed in the questionnaire, only one—**presstime**—was reported to be used by a majority of respondents, 73 percent. Information on and assistance in the Newspaper in Education program was the second most widely used service at 46 percent.

Forty-three percent of top managers said they had attended an ANPA Convention, and 34 percent said they had attended ANPA/TEC.

- **Editors.** "Editorial quality" was cited as the second most important issue behind "circulation/readership." "Minority opportunity" was the eighth-most-important issue among 14 rankings. The editors put environmental issues at the bottom of their priority list.
- **Advertising/circulation.** Like top management and editors, this group cited "circulation/readership" as the top concern. "Reading skills/literacy" was the second-

How top executives rate issues affecting the newspaper business

(as a percentage of 729 respondents)

	Most important today	Should be priorities now	Will need ANPA help in future
Circulation/readership	90	67	40
Reading skills/literacy	55	27	26
Competition from other print media for advertising and circulation	48	28	24
Editorial quality	47	18	15
Operating costs	42	14	17
Distribution and delivery	40	17	17
Newsprint	40	18	16
New production methods and technology	37	22	28
Competition from television/cable for advertising and audience	35	18	20
Impact of government on newspapers	34	30	28
Postal rates and services	34	22	20
Personnel recruitment and training	31	13	14
Production quality improvement	27	12	17
Free press issues	24	14	14
New media/electronic directories/electronic classifieds	23	10	20
Minority opportunity	18	9	8
Employee health/drugs/AIDS issues	13	7	14
Environmental issues	11	8	14
Labor unions	10	4	5
International press freedom	6	2	4

most-important, followed by competition from other print media for advertising and circulation. Minority opportunity and "employee health/drugs/AIDS issues and incentives" tied for last.

• **Human resources.** The majority of this group said the most important topic for the newspaper business is "employee compensation/bonus and incentives," followed by "employee health/drugs/AIDS issues." Minority hiring was rated sixth among nine topic rankings, and labor unions ranked eighth. (Human resources executives were not asked to comment on circulation/readership, marketing or editorial issues.)

• **Production.** Most respondents said "new production methods and technology" constitute the top priority, followed equally by newsprint quality and price, and production quality improvement. Minority opportunity was 11th of 12 rankings, and "labor unions" was last. (Like the human resources group, production executives were not asked to comment on circulation/readership, marketing or editorial issues.)

For other information about the survey, contact the ANPA Public Affairs Department at The Newspaper Center, Reston, Va. □

Terrell joins presstime as assistant m.e.

Pamela M. Terrell has joined presstime as assistant managing editor.

Terrell had worked since 1981 for United Press International, initially as a reporter in Memphis and most recently as desk editor in UPI's Washington, D.C., headquarters.

Pamela M. Terrell

Prior to that, she was a reporter for the Arkansas Democrat of Little Rock, including a stint as Washington correspondent. She also was a Munich-based free-lance editor and translator, an English teacher, and a congressional aide.

She holds a bachelor's degree in English literature from the University of California, Berkeley, and has done graduate work.

Terrell, her husband and their daughter live in Reston, Va. □

Manasco to oversee press, plate operations

Gene Manasco, formerly an ANPA production engineer, has been promoted to manager/press and plate systems in ANPA's Technical Research Department.

Gene Manasco

Manasco has been with ANPA since 1974, when he was hired to gather offset printing data from newspapers for use in ANPA research. In his new role, he will be responsible for the operation of all press and plate systems used in Association research and also will supervise The Newspaper Center machine shop.

Manasco also oversees ANPA's quality programs, including a service that evaluates printing reproduction for newspapers. The promotion is effective immediately, ANPA President Jerry W. Friedheim announced. □

Do You Understand Your Waste Management Responsibilities?

8th Annual
ANPA Health and Safety Symposium
Boston Marriott Long Wharf
November 3-4, 1988

Newspaper waste management is an increasingly complex and difficult responsibility. The 1988 ANPA Health and Safety Symposium will address waste management and other issues of importance to newspaper managers. This year's topics will include:

- Ink and Solvent Recycling
- Newsprint Recycling
- Waste Management Programs
- Superfund
- Community Right-to-Know
- Drug Testing Update
- Safety and Security Programs
- California Proposition 65
- OSHA and NIOSH Developments
- Newspaper Nursing

The 1988 Symposium brings you relevant presentations from experts in the newspaper industry and in the industrial and environmental health fields. The $375 registration fee covers admission to all symposium sessions, continental breakfast on both meeting days, a reception Wednesday evening and a luncheon on Thursday.

Call ANPA Environmental Services at (703) 648-1219 for more symposium information and a registration form.